EA

WITS ENHANCED ARCHITECTURE USER GUIDE

Maria Ferrante

FEI SYSTEMS

June 2015

Table of Contents

Introduction

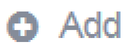
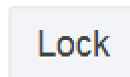
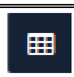
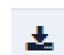
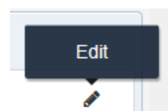
This user guide has been prepared for all instanced of WITS. It serves as an introduction to acclimate the user to the new Enhanced WITS Architecture – Staff Model Changes. This guide will focus on the Staff Module and take the user through a step by step process of how to view and enter data in this module. In addition, this guide will highlight key differences in WITS Prime vs. WITS EA Staff Module.

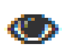
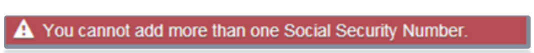
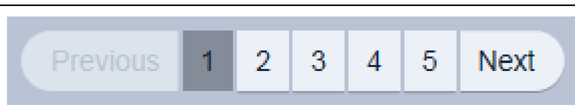
Please review the WITS EA Basics section of this document as it highlights new icons and topics features you will come across as you begin using the new Staff Module.

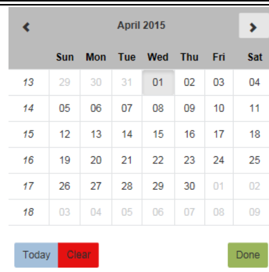
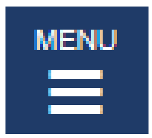
WITS EA

Basics

The Basics section acquaints the user with new icons and features used throughout the staff module.

	**Add:** Allows the user to add data to the panel or section.		**Edit:** Allows the user to edit information on a panel or section.
	**Remove:** Allows the user to delete information in the panel or section.		**Lock:** Allows the user to lock an item.
	**History:** Allows the user to view the changes made on the current page.		**Panel View:** Presents data in a panel by panel view.
	**Table View:** Presents data in a table format.		**Export:** Allows the user to export results.
	**Column Selector:** Allows the user to select the columns that they would like to view.		**Hover Text:** When you hover over an item or symbol text describing the item may appear.

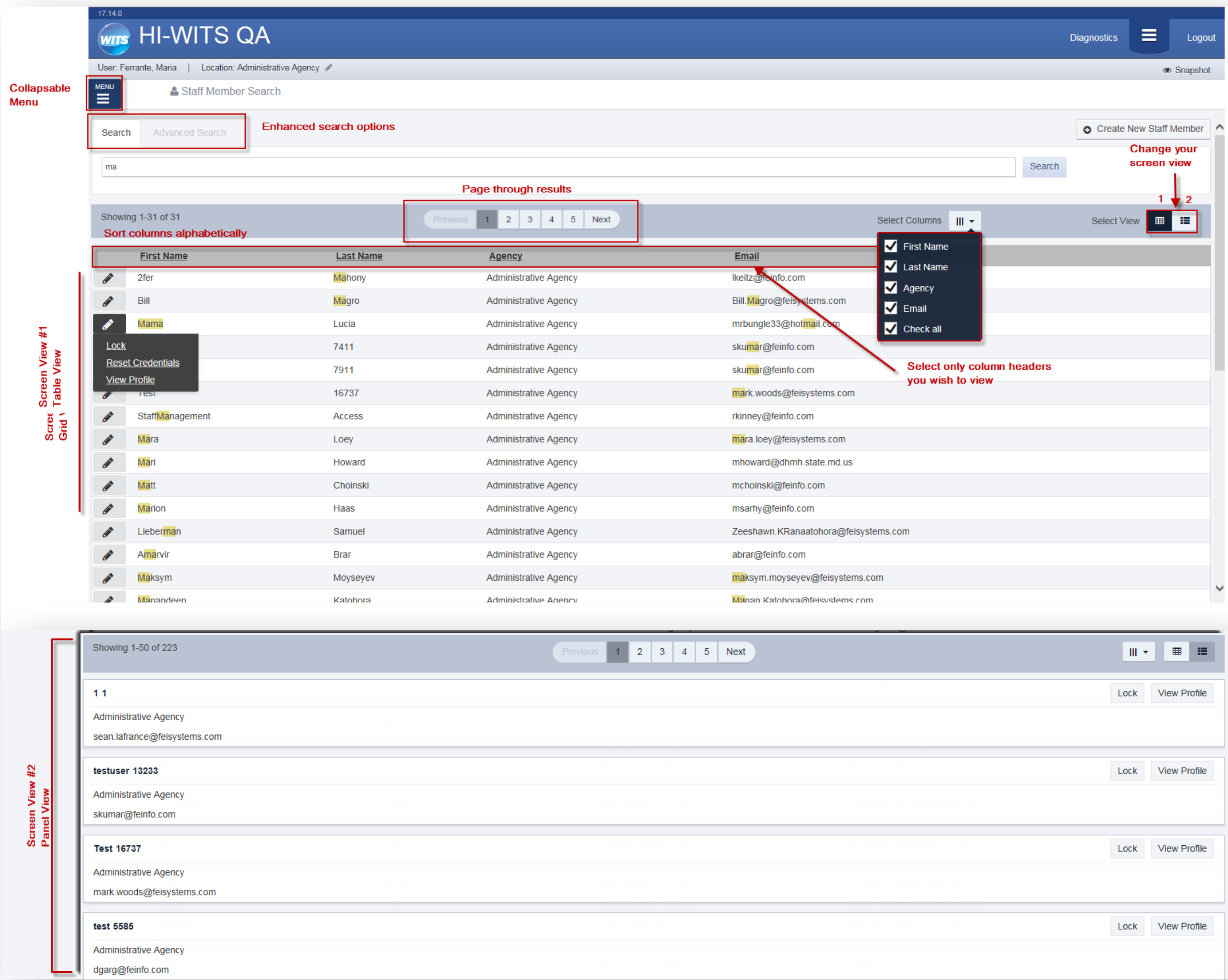
 From: ••• To: 123	**Eye Icon:** Allows the user to see protected information hidden by dots. By hovering over the icon they can now see the actual information contained within the field.
	**Error Message:** The error message is localized and is generated where the error occurred.
	**Required Field:** Has a red bar to the right of the field. User must enter data to save.
	**Discretionary Field:** Is not a mandatory field to complete the panel and will not affect the completion or saving of a record.
	**Pages:** Allows the user to page through all search results.

	**Date Picker:** Allows the user to pick a date from a calendar.
	**Likert Scale:** Presents information visually and allows for quick interpretation of the data.
	**Collapsible Menu:** The left hand navigation menu is collapsible in WITS on the Staff Member and System Account screens. When it is collapsed you will only see the icon to the left. When it is un-collapsed you will see the entire left hand navigation panel.

New Screen Features

The screen mockups for the Staff Member Search and Staff Member Profile screens serve to acquaint users with the new layout and to point out new features in the WITS that a user can leverage when using the system.

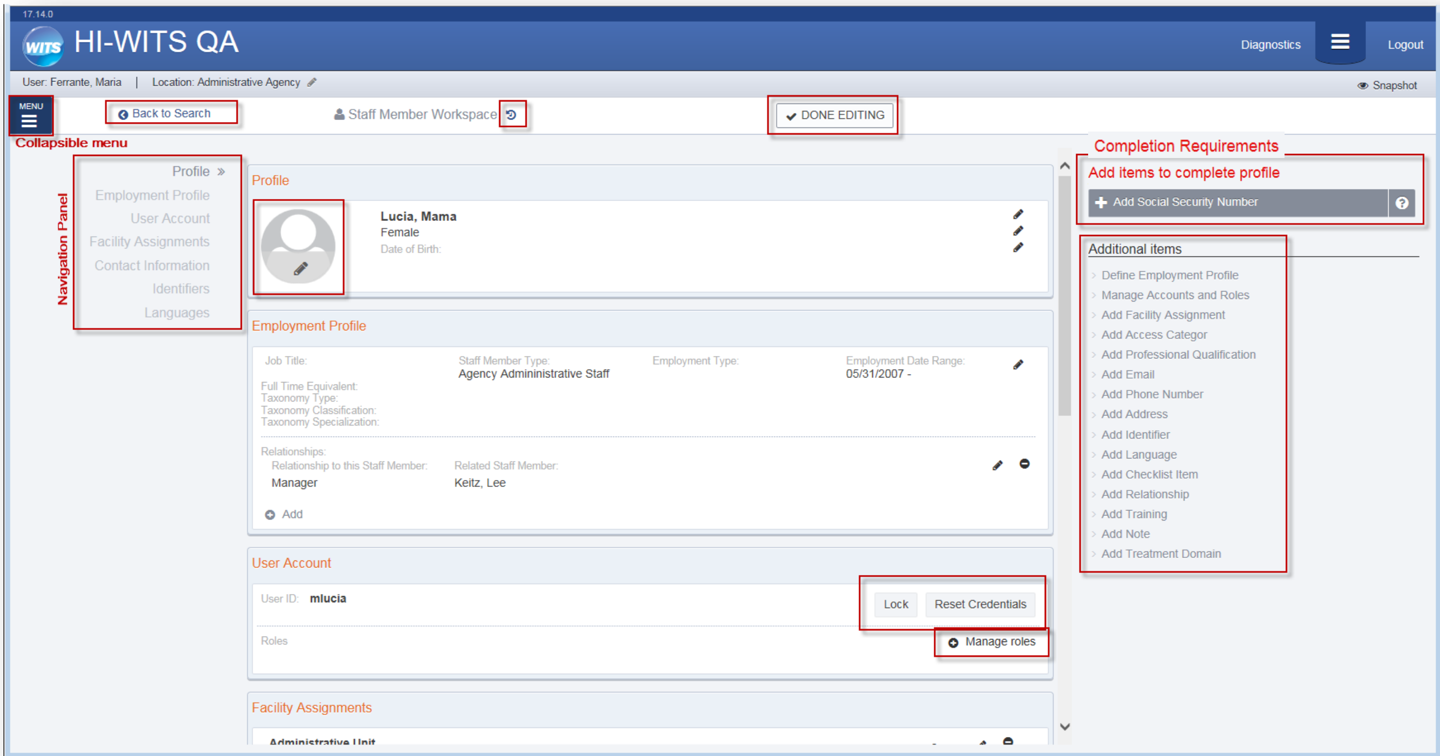
Staff Member Search Screen



Staff Member Search Screen Features

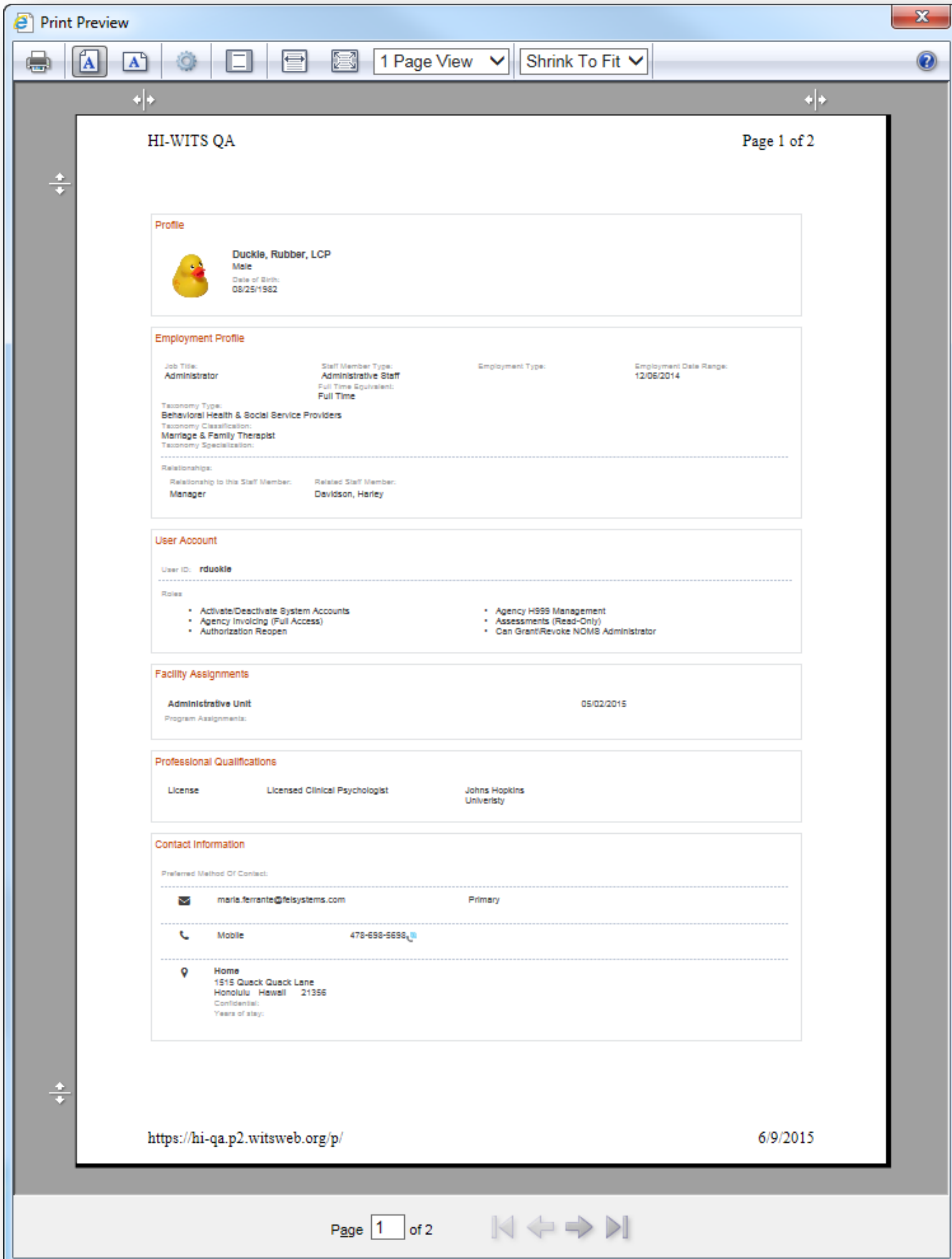
1. **Collapsible menu**- allows more horizontal on screen real estate
2. **Searches:**
    a. *Simple Search*- searches through the columns that are currently displayed on screen for the values that were entered. It is a "contains" type of search.
        i. Customize this by adding selected columns to show on screen
        ii. New UI searches as you type
        iii. Matching search results highlighted.
    b. *Advanced search*- enables you to choose search criteria and save those searches to your computer via a cookie.
        i. Allows the user to search columns that they choose.
        ii. Save your advanced searches
        iii. Matching search results highlighted.
3. **Page through search results**- search results are not limited but will be shown a page at a time.
4. **View of data**
    a. *Table View-Shows the data as a list of rows and columns.*
    b. *Panel view –Shows the data as a list of panels.*
5. **Staff Member List**
    a. *Column Headers*
        i. Sorts staff members by the selected columns when clicked.
        ii. The user can customize which columns are displayed.
    b. These preferences are saved to your computer only.

Staff Member Profile Screen



Staff Member Profile Screen Features

1. **Collapsible menu**- allows more horizontal screen real estate.
2. **Panels**- are seen only if they have data, eliminating long lists and multiple screens.
   a. Panels are designed for information presentation rather than data entry.
3. **Completion Requirements** - define the requirements for an item to be complete.
   a. Profile completion is tracked. You add the Staff Member information and save immediately.
   b. Completion Requirements shows you what is missing.
4. **Domain event history**
   a. Tracks all operations / changes in reverse chronological order. Currently only key fields are displayed so you understand the key operations performed.
   b. Enables the user to see more audit records.
5. **Dropdowns now have paging** – helping to manage many values in a long dropdown.
6. **Ease of printing**- displays the panels without all the extra spacing and formatting.


Print Preview

1 Page View

Shrink To Fit

HI-WITS QA

Page 1 of 2

Profile

Duckie, Rubber, LCP
Male
Date of Birth:
08/25/1982

Employment Profile

Job Title:
Administrator

Staff Member Type:
Administrative Staff

Full Time Equivalent:
Full Time

Employment Type:

Employment Date Range:
12/06/2014

Taxonomy Type:
Behavioral Health & Social Service Providers
Taxonomy Classification:
Marriage & Family Therapist
Taxonomy Specialization:

Relationships:
Relationship to this Staff Member: Manager
Related Staff Member: Davidson, Harley

User Account

User ID: rduckie

Roles

- Activate/Deactivate System Accounts
- Agency Invoicing (Full Access)
- Authorization Reopen
- Agency H999 Management
- Assessments (Read-Only)
- Can Grant\Revoke NOMS Administrator

Facility Assignments

Administrative Unit 05/02/2015
Program Assignments:

Professional Qualifications

License Licensed Clinical Psychologist Johns Hopkins Univeristy

Contact Information

Preferred Method Of Contact:

maria.ferrante@feisystems.com Primary

Mobile 478-698-5698

Home
1515 Quack Quack Lane
Honolulu Hawaii 21356
Confidential:
Years of stay:

https://hi-qa.p2.witsweb.org/p/

6/9/2015

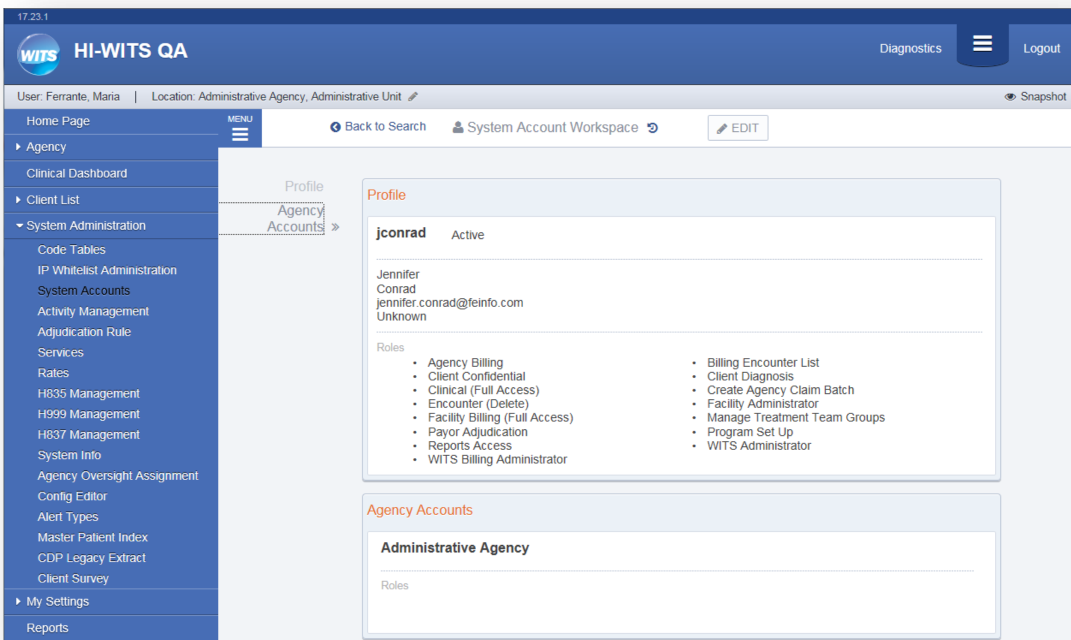
Page 1 of 2

Accounts

WITS EA introduces two types of accounts, a System Account and an Agency Account.

A System Account is the overarching account which allows users such as WITS Administrators to have the same roles in all Agencies in WITS. Any user’s login information also lives here as the System Account represents the user’s login to the system. In contrast, the Agency Account is where the System User’s Staff Member record is created, and where the user’s roles or permissions in that agency are created and live.

In the screenshot below, you can see the System Account for user “jconrad”. This user has cross-agency roles such as “WITS Administrator”. You can also see that this user has a Staff Member record in the Administrative Agency. Note that the user has no assigned roles within the Administrative Agency. This user’s roles will carry over to every agency from the System Account role assignments.



Agency Accounts versus System Accounts

a. Old Structure:
    i. Every user had an account under an agency. Some users had cross-agency roles assigned within that agency.

b. **New Structure:**
    i. A System Account represents a user's login to the system.
    ii. An Agency Account lives under a system account, and represents a user's access to a particular agency.
    iii. Everyone who has access to WITS (a login) has both a System Account and an Agency Account.
    iv. When a user logs into WITS they receive both the system account roles and the agency account roles.
    v. In place of the old "Staff List" you will see the "Staff Members" menu. This area allows for searching, additions and updates of a user's account <u>within the context agency</u>.
    vi. Staff who are set up in WITS but do not have a login are found simply under the Agency - > Staff Members menu item, in their context agency. These individuals do not have a System Account or an Agency Account.
    vii. There is also a System Accounts menu item under System Administration. As a WITS administrator, you will be able to see All System Accounts and Agency Accounts across the system.

c. **Agency – Staff Members**: Agency Accounts as well as Staff Member information is available at the Staff Member menu item.
    i. You will primarily use the Staff Member screens (in the context of an agency) to set up any new user.
        1. As soon as you add the Account information, WITS will create both a System Account and an Agency Account.
        2. All Agency Account roles can be assigned here.
        3. If you need to give a new user cross-agency access roles (such as WITS Administrator, Agency Full Access, ATR Administrator, SBIRT Administrator, Agency Oversight, etc.), you will go to the System Administration – System Account menu item to do this.
    ii. You will set up Staff Members who do not have access to WITS (who do not have an account) here.

d. **System Administration – System Accounts:**
    i. This area will primarily be used to find all of a user's Agency Accounts and compare to their system account, as well as to give roles to the System Account.
        1. Any user who has cross agency access roles, may in fact have a different set of permissions their Agency Account.
    ii. This area is also used to set up cross-agency role access for specific staff who need that.

e. **Migration of current users:**
    i. Users who were authorized for any type of cross-agency access will find that those roles are visible and modifiable available through System Administration – System Account. Their Staff Account (at the agency level) will have no roles.
    ii. All other users (those who were not authorized for any type of cross-agency access) will find that they have a System Account and a Staff Member profile with the appropriate roles assigned to them, as they were assigned previously.

Staff Members

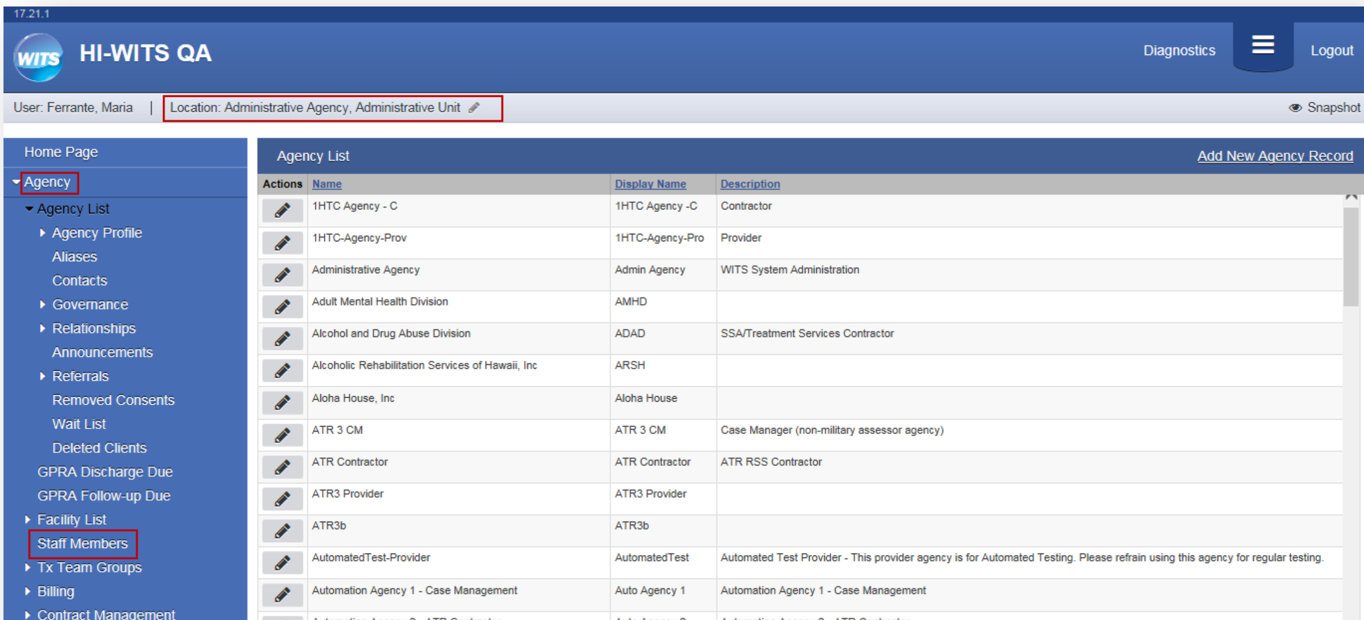
A staff member is a member of the staff of that agency. Staff members live at the Agency level.

Searching For a Staff Member

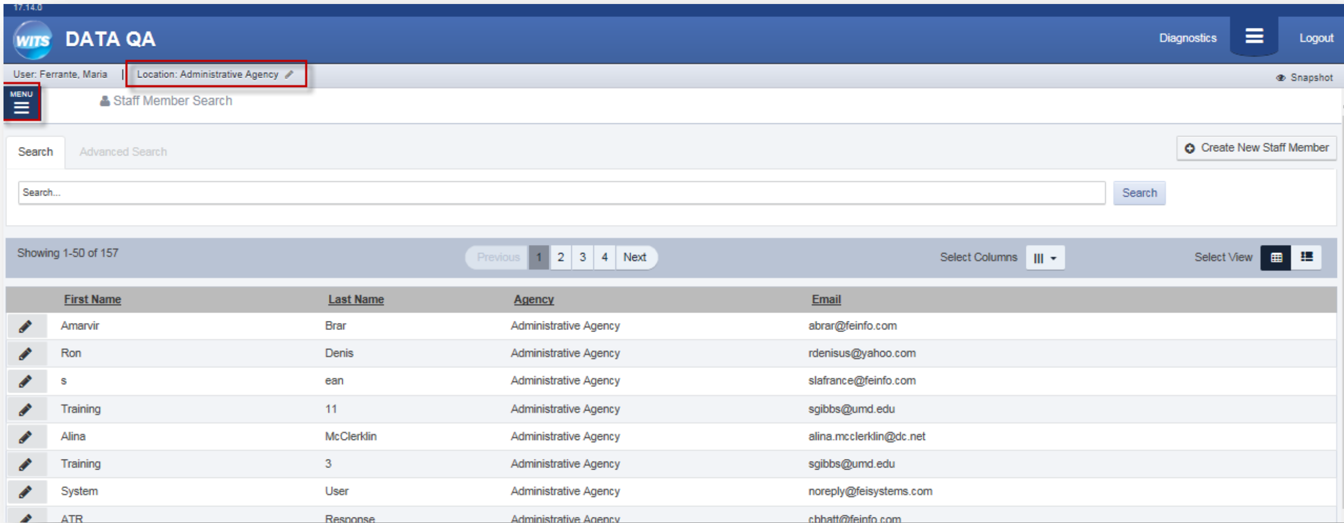
Note: The Staff Member menu item was previously called Staff List.

To begin:

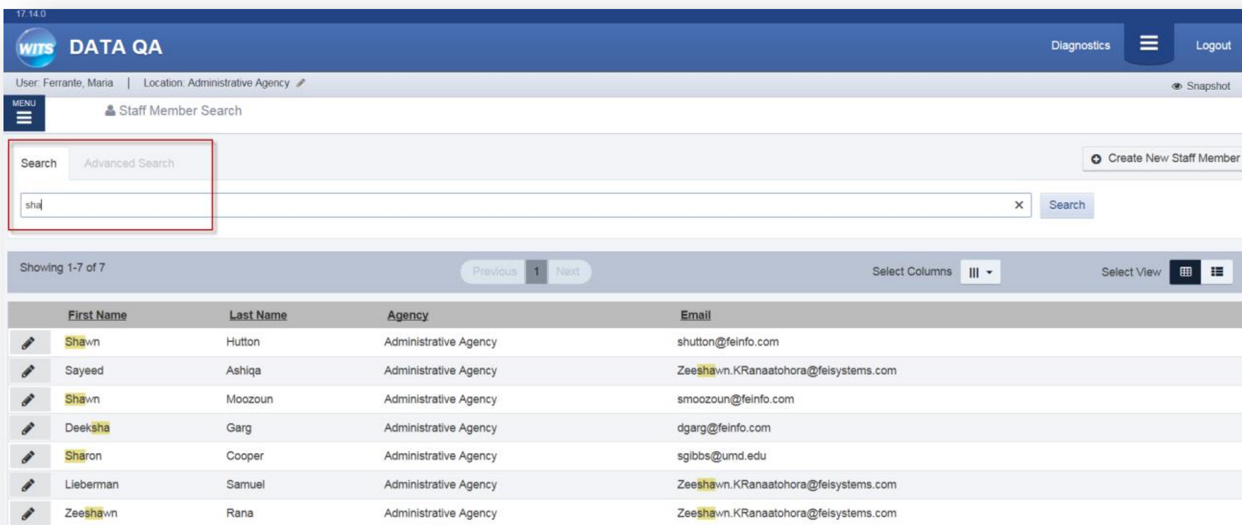
1. Ensure you are in the proper agency prior to searching for a staff record in that agency.
2. In the left menu, click **Agency**, then **Staff Members.**



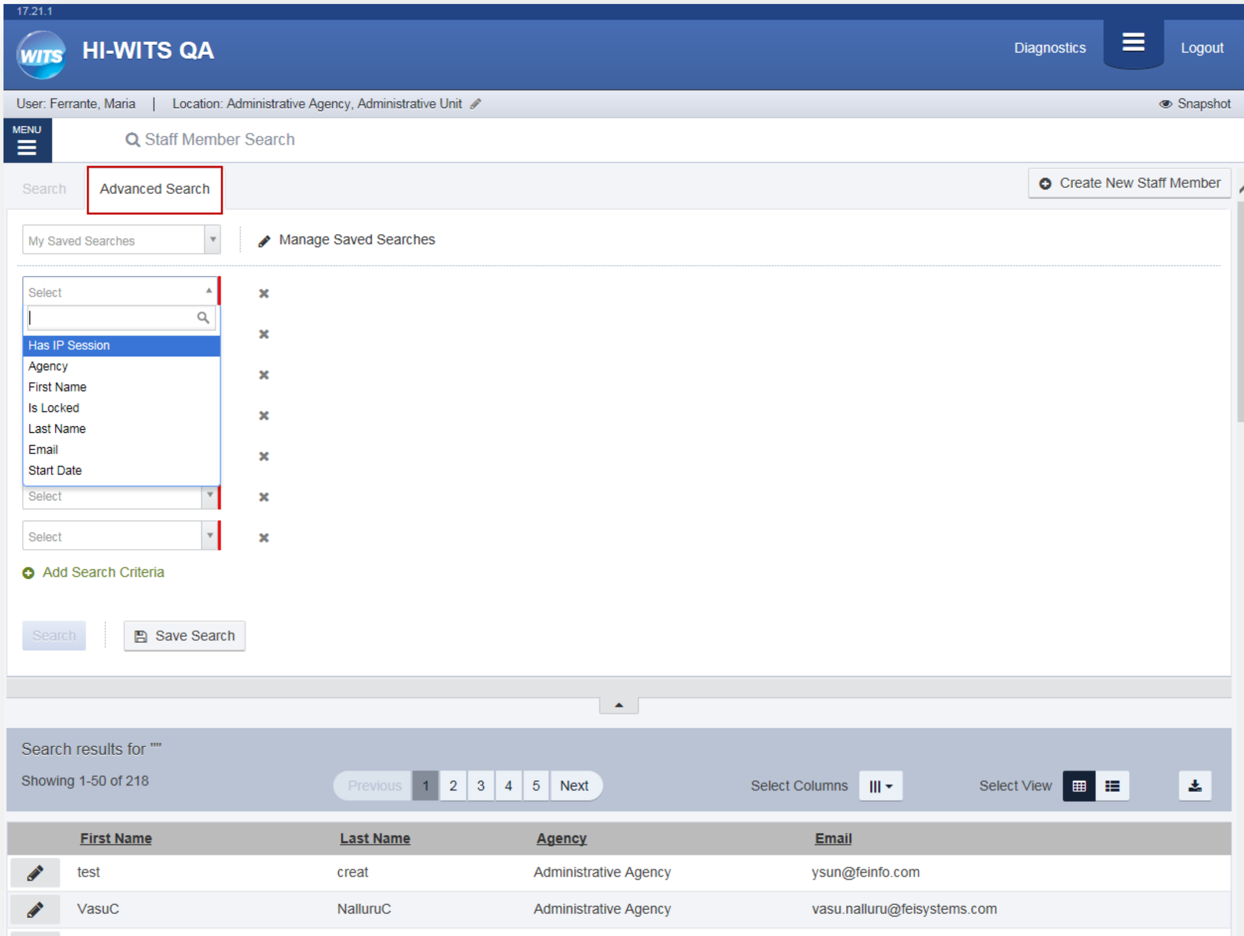
3. The new Staff Member screen will open.



4. To search for an existing Staff Member, begin by typing the staff members name in the simple search. As you begin to type the staff members name, the list screen begins to filter and the corresponding characters in those records are highlighted in yellow.



5. Or, search for an existing Staff Member by creating a custom search by using the advanced search.

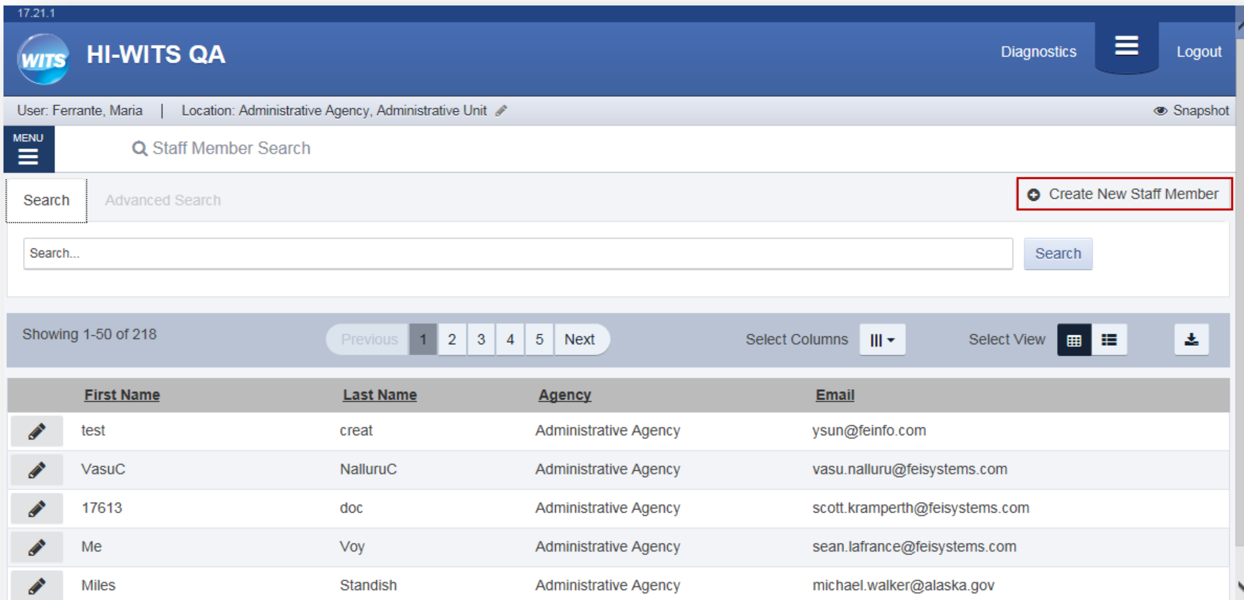


Note: When in an agency and searching for a staff member whether the user is either using a simple search or advanced search users can only search for a staff member in the agency that they are currently in. If they would like to search for a staff member across all agencies they can do so by clicking on System Administration followed by clicking on System Accounts and conduct their search.

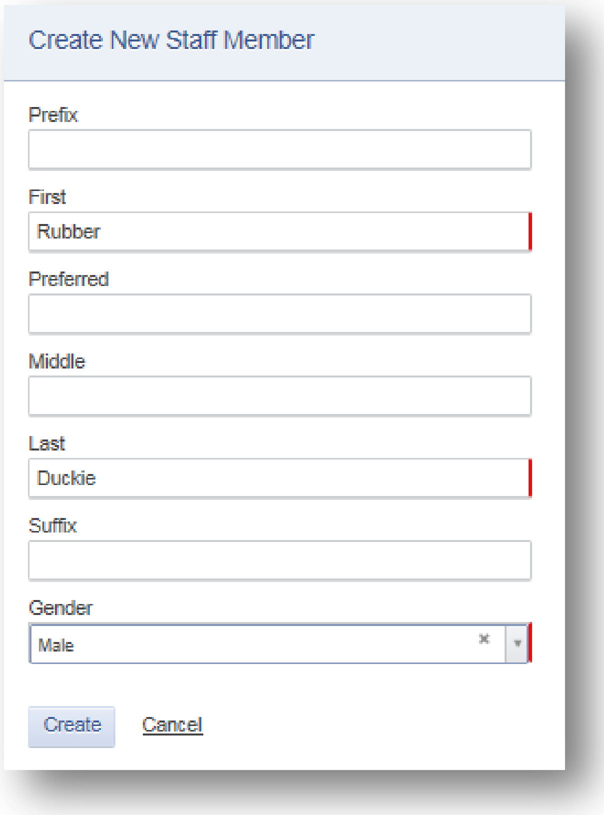
Creating a Staff Member

1. Ensure you are in the proper agency prior to creating a staff record for that agency.

2. To create a new staff member click the **Create New Staff Member** link to open the **Staff Profile** screen.

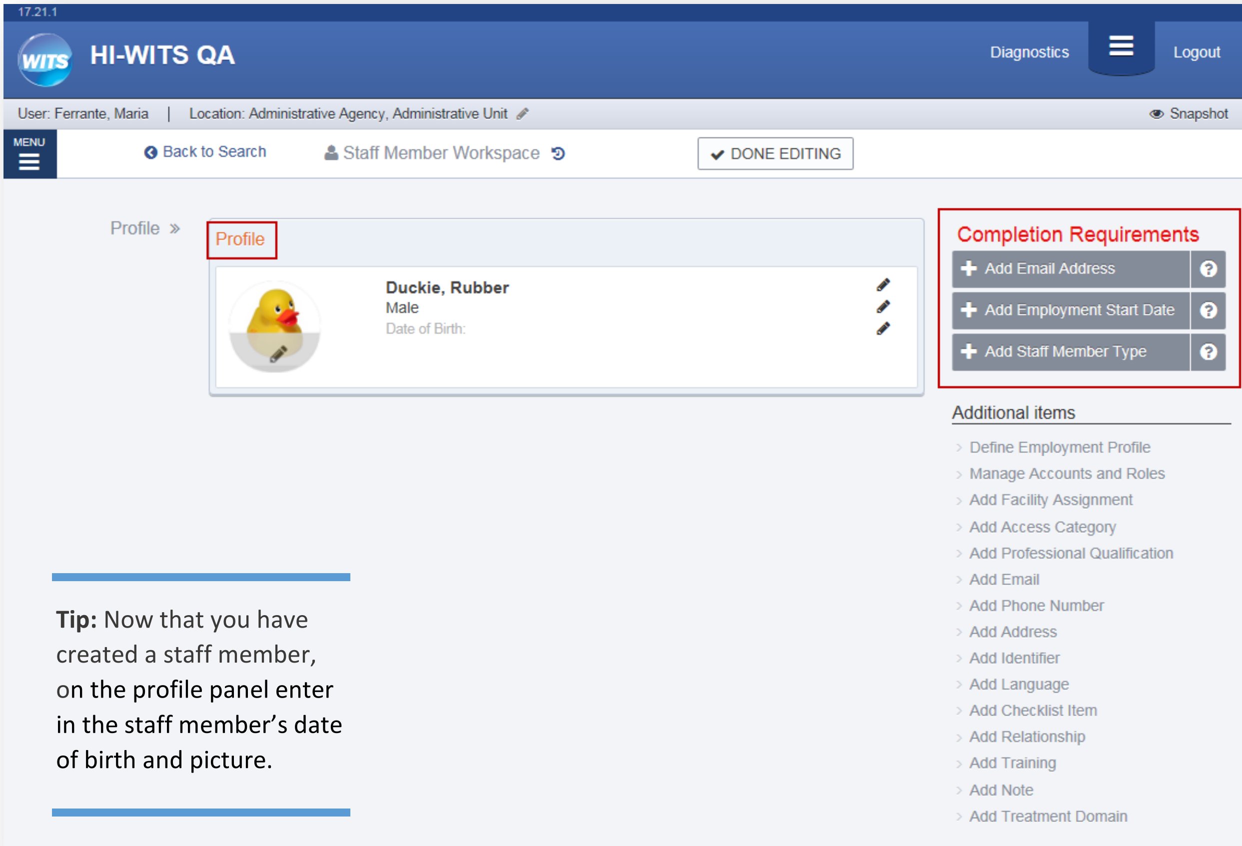


3. On the **Create New Staff Member** screen, enter the required information (indicated by a red bar to the right of the field) including:
    a. **First Name**
    b. **Last Name**
    c. **Gender**
4. When complete click **Create.** You will then be taken to the Staff Member **Profile** screen.



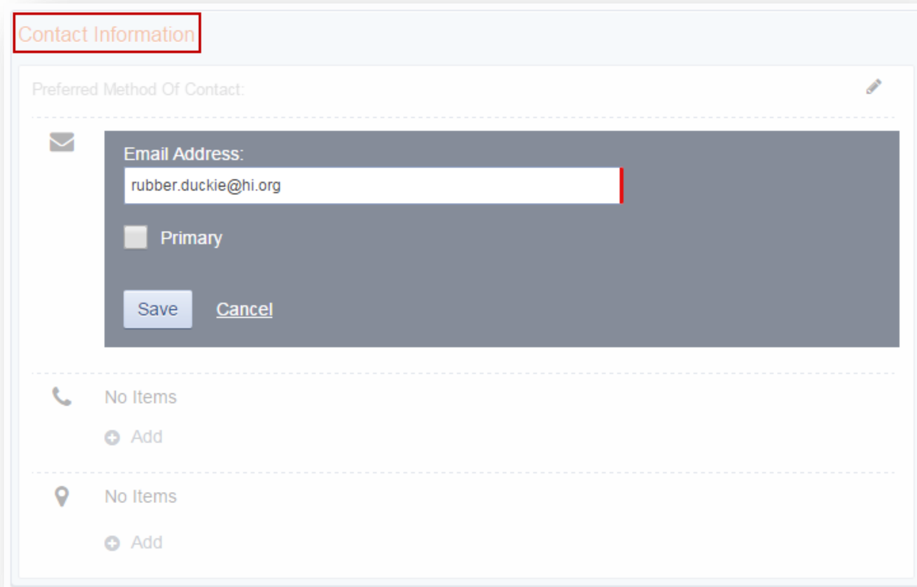
Tip: The create button will remain un-active until all required fields have been completed.

Creating a Staff Member's Profile



Tip: Now that you have created a staff member, on the profile panel enter in the staff member's date of birth and picture.

1. Use the **Completion Requirements,** to complete the Staff Member's profile with the required information including:
   a. **Add Email Address**
      i. To begin, click on **Add Email Address** under the **Completion Requirements** section.
      ii. Enter the email address.
      iii. Click **Save**.
      iv. After adding an email address you can also add:
         1. Add a phone number for the staff member.
         2. Add an address.
         3. Select the preferred method of contact.

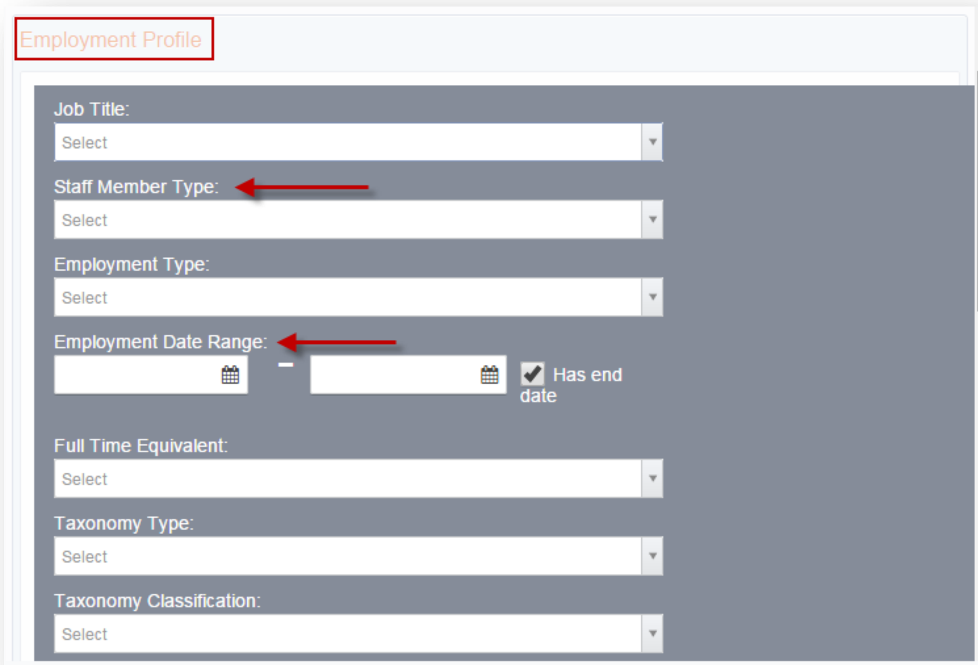


If additional Contact Information needs to be added click **Add** under the corresponding section of the panel and repeat the above steps.

Tip: When adding email addresses make sure to designate one as primary by checking the primary box as this will determine the email account where the staff member will receive their WITS login information.

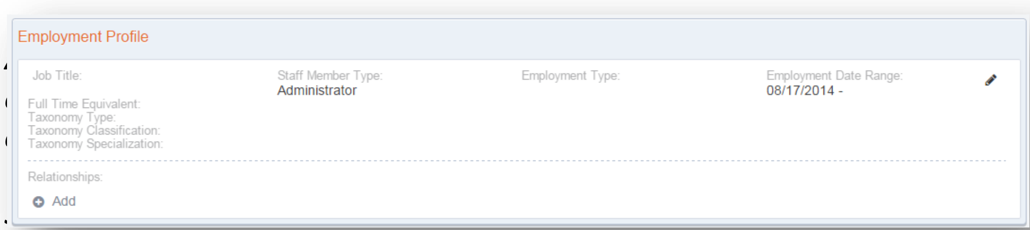
b. **Add Employment Start Date & Add Staff Member Type**

   i. To begin, click on **Add Employment Start Date** under the **Completion Requirements section**. The **Employment Profile** screen shown below opens.
   ii. Enter the **Employment Start Date.**
   iii. Note: The **Staff Member Type** which is the next item on the completion module is also on this screen.
   iv. Select the **Staff Member Type.**
   v. Complete any additional fields as necessary.



   vi. Click **Save.**

   i. The panel now appears as below.

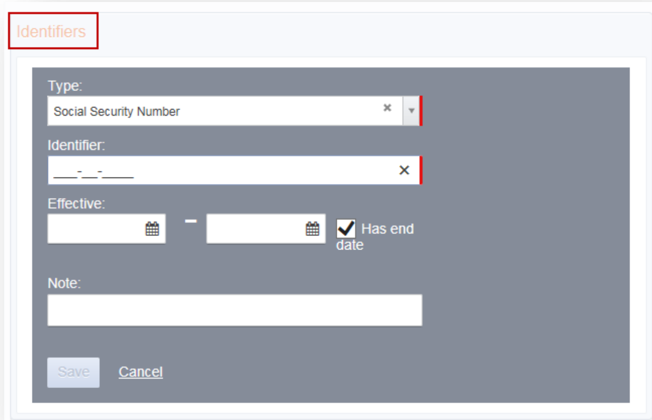


c.

o

c

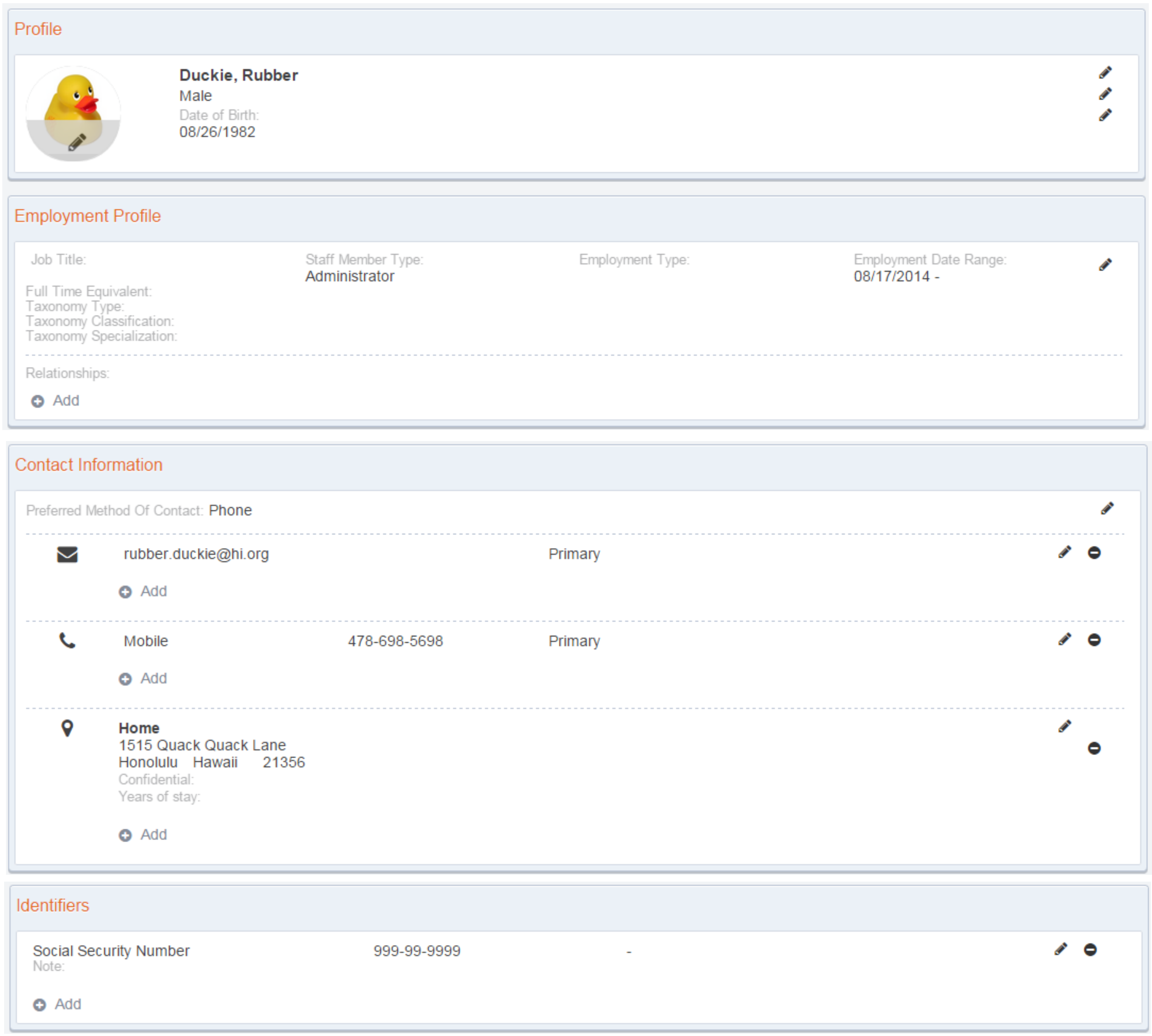
***ial Security Number** (This field may or may not show up in the completion module* *depending on whether or not you have this as a required field in WITS Prime, however, it does show up in the **Additional items** list under **Identifiers** for everyone to use).*



1. To begin, click on **Add Social Security Number** under the **Completion Requirements** section and the **Identifiers** screen above appears.
2. Choose **Social Security Number** as the **Type** of **Identifier**
3. **Enter** the social security number
4. Click **Save**
5. If additional **Identifiers** such as DEA numbers, Employee Numbers, Social work number etc. need to be added click **Add** under the corresponding section of the panel and repeat the above steps.

Tip: As you complete menu items whether in the **Completion Requirements** section or in the **Additional items** sections the items move from the right hand side of your screen under the Completion Module to the left hand side under **Profile**. By clicking on the items under profile this can be used as a navigation menu to view completed items in the staff member's profile. As the user clicks on the various panels they are automatically brought to that panel.

If the **Completion Requirements** sections ONLY are completed the Staff Members profile will appear as below:



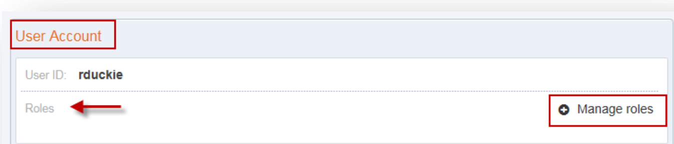
Creating Staff Member Accounts

After you have completed all the items in the **Completion Requirements** section, the next step is to set up the staff member with an account in WITS. The following additional items must be completed:

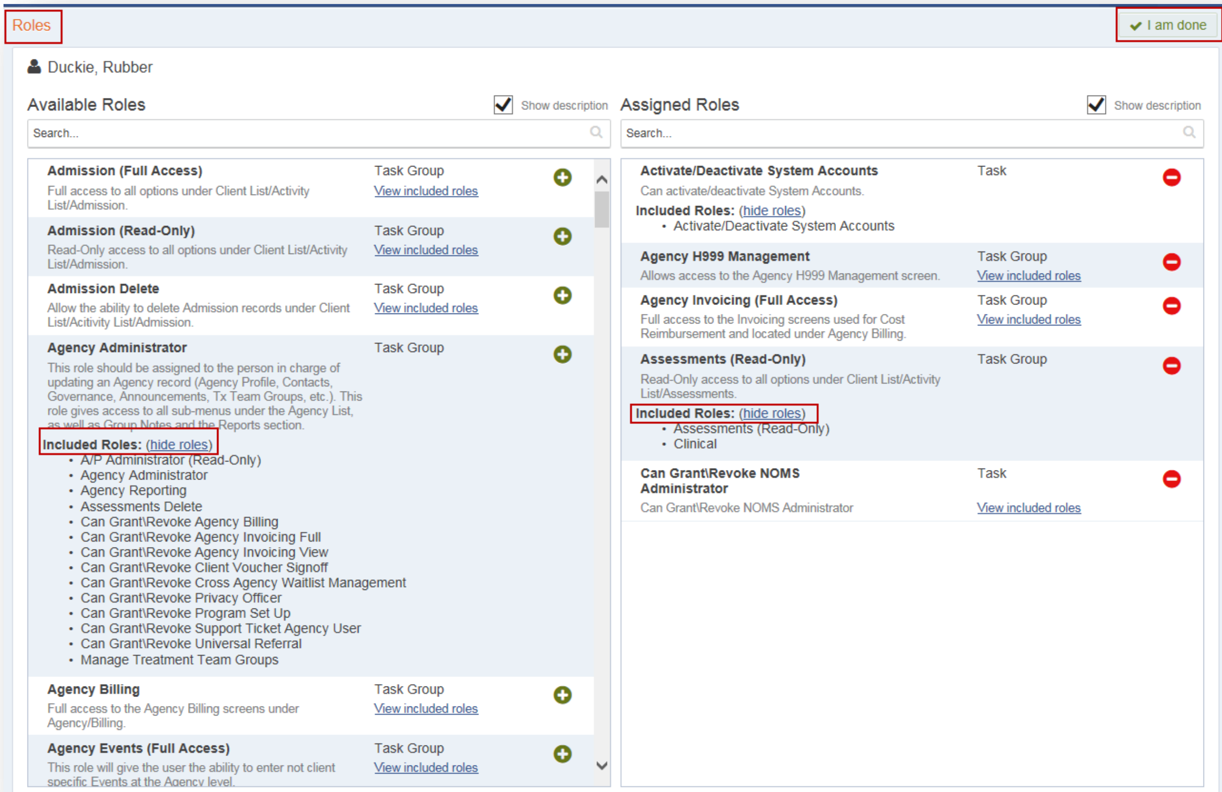
1. **Manage Accounts and Roles**: *This allows you to create a login for your staff member and grant them access to perform various actions.*
    a. To begin, under the **Additional Items section** click **Manage Accounts and Roles**.
    b. This will open the **User Account** panel below.

Tip: Once you enter a user ID you cannot edit this field.

    c. Enter the **User ID** that you would like the staff member to use to log into WITS.
    d. Next, click **Create Account.**
    e. When you click **Create Account** the username is automatically emailed to the staff member. In a separate email the staff member also receives a link which allows them to set their password, pin and security question.
    f. Once you have created the staff member's account, the **User Account** panel now displays a Role section.



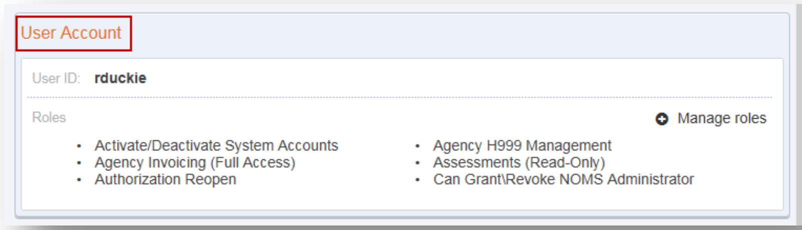
    g. To assign roles to the staff member click **Manage roles**.



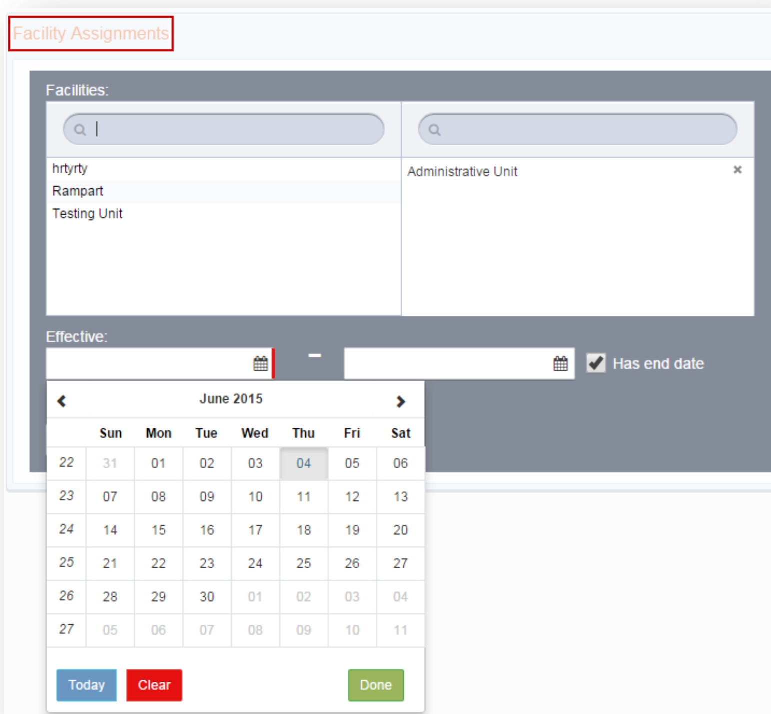
Tip: The roles that you are granting the Staff Member here are at the Agency Account level.

h. The **Roles** screen below appears.
i. Users can:
    i. Search for available roles by typing in the available roles search box which will filter the results as the user types
    ii. View included roles in each role
    iii. View the role description
j. To select a role click on the associated **plus sign**. This will automatically move the selected role from the **Available Roles** to the **Assigned Roles** box.
k. To delete a role chosen by mistake, click the associated **minus sign**. This will automatically move the selected role from the **Assigned Roles** to the **Available Roles** box.

l. When all roles have been assigned for this user click **I am done**. All chosen roles are now shown in the **User Account** panel.



2. **Facility Assignment:** *Allows you to assign the Staff Member access to a facility.*
   a. To begin, under the **Additional Items section** click **Add Facility Assignment.**
   b. The **Facility Assignments** screen appears.

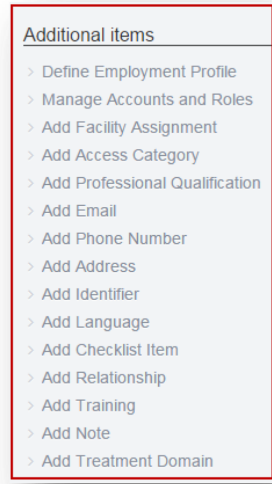


Tip: Select one facility at a time and enter the effective start and end dates if applicable. This will allow you to grant user access to that facility for a specified period of time.

   c. Select the **Facility** that you would like the staff member to have access to.
   d. Select the **Effective** or beginning date of access. If applicable, select the end date you would like the access to end, otherwise, uncheck the **Has end date** box.
   e. Click **Save.**

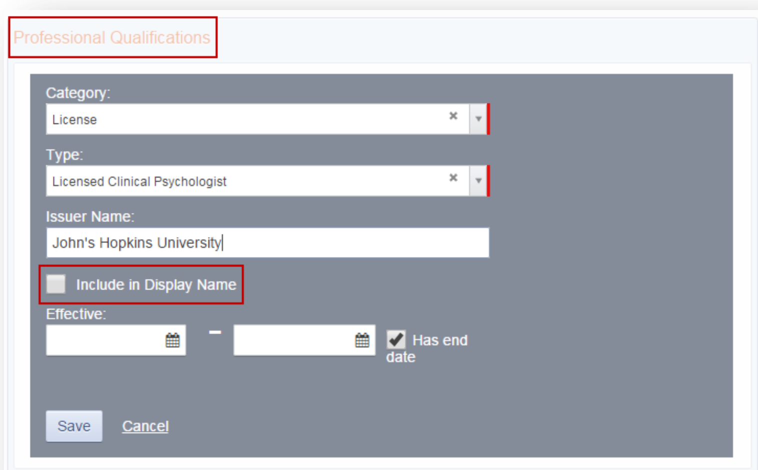
Adding additional items to a profile

The remaining items under the **Additional items** section allow the user to customize the staff member's profile with relevant data. It is important to note that some of the panels such as access category, and the treatment domain panel below are exposed and used in some WITS instances, exposed but not used in others and NOT shown in some instances. Please only complete panels which you normally complete in WITS Prime or find useful.



Professional Qualifications: This panel allows us to denote a degree, certification, or license held by the staff member. In addition you can record the issuing institution and the effective dates.

a. To begin, under the **Additional Items section** click **Add Professional Qualifications.**
b. The **Professional Qualifications** panel appears below.



Tip: After completing the **Professional Qualifications** panel if you click **Include in Display Name**, the **Profile** panel now shows the user's credentials next to their name.

c. Select the **Category** the degree falls into:
    i. Certification
    ii. Degree
    iii. License
d. Select the **Type**: Filters based on the category chosen.
e. Complete the **Issuer's Name** field.
f. Enter the **Effective Dates** if applicable.
g. Click **Save**.

Language: Being able to communicate in more than one language can be essential in the treatment process if a client does not speak English. The Languages panel allows you to document the various languages that a staff member speaks and the proficiency by using a Likert Scale. The Likert Scale allows you to quickly view the expertise of a staff member's reading, speaking and writing by looking at the multi-colored scales.

a. To begin, under the **Additional items section** click the **Add Language**.
b. The Languages panel appears.

c. Select the language that the staff member speaks.
d. Next, hover over the various scales. Each rectangle indicates the corresponding proficiency level. Choose the appropriate level for each of the scales.
e. Click **Save**.
6. To add additional languages click **Add** under the corresponding section of the panel and repeat the above steps.

Checklist Item: The Checklist panel allows you to create a checklist of items which have been completed or are in the process of being completed for the staff member such as a background check and performance review.

> ***Note****: In WITS Prime Check List items were displayed on the Staff Profile screen. Some instanced had its turned on and other had it turned off. These seven items below have either become Check List items or a Check List Item Follow Up Question.*

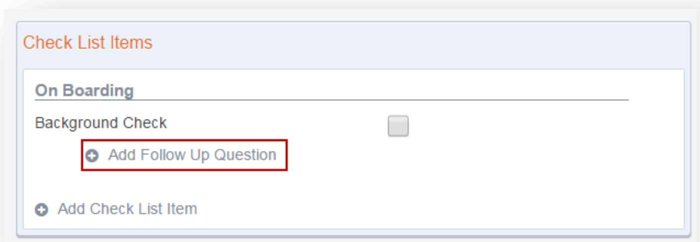
- ✓ *Dev. Plan Date*
- ✓ *Last TB Test Date*
- ✓ *Preformance Review Date*
- ✓ *Policies and Procedures Manual Received*
- ✓ *Required Background Checks Completed*
- ✓ *Backgroud Check Outcomes Acceptable*
- ✓ *Last Performance Appraisal Process Participation*

a. To begin creating a Check list, under the **Additional Items section** click the **Add Checklist Item**.
b. The **Checklist** pannel appears.

c. Select the correct category:
   i. On Boarding
   ii. Periodic
   iii. Separation

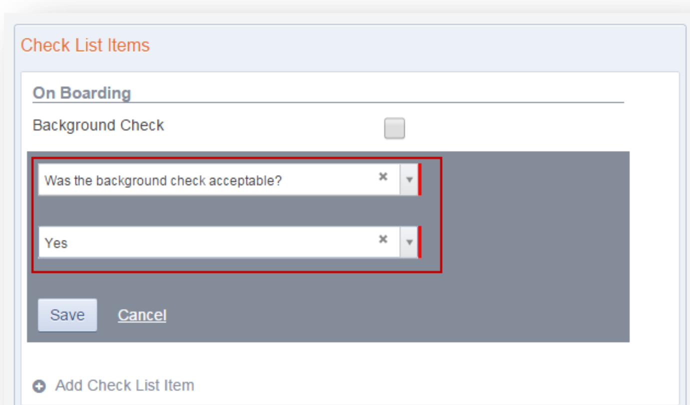
b. Select the corresponding **Type**.

d. Then click save. The screen will appear as below.

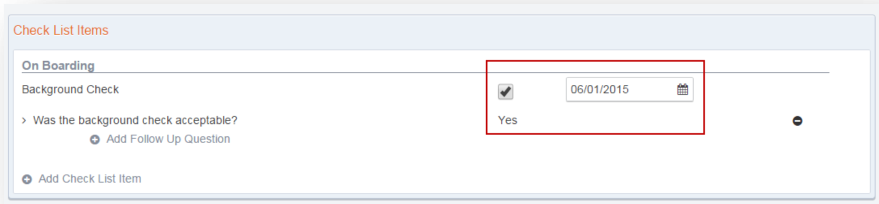


e. Next, click **Add a Follow Up Question**.

f. Select the corresponding question and answer and click **Save**.



g. Check the check box to show the checklist item has been completed and enter the completed date.

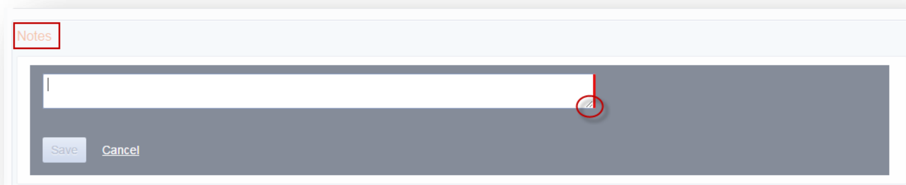


h. To add additional checklist items click **Add** under the corresponding section of the panel and repeat the above steps.

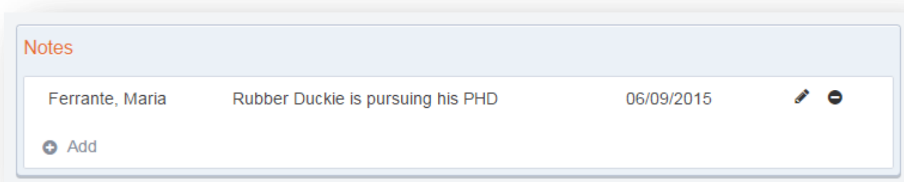
Notes: The Notes panel allows you to document anything you feel necessary in regards to this staff member. As you type the box automatically expands which allows the user to easily view what is being typed. In addition, the user also has the ability to enlarge the text box by pulling the tab in the lower right hand corner of the box.

a. To begin, under the **Additional items section** click the **Add Note.**

b. The **Notes** panel below appears.



c. Enter your note.
d. Click **Save.**



e. To add additional **Notes** click **Add** under the corresponding section of the panel and repeat the above steps.

Tip: When your note is saved WITS automatically enters a date stamp on the panel.

Training: The training panel allows you to enter any trainings that the staff member has completed and the date of completion.

a. To begin, under the **Additional Items section** click the **Add Training.**
b. The **Training** panel below appears.
c. Enter the training course that the staff member completed.
d. Enter the date the course was completed.
e. Click **Save.**
f. To add additional **Trainings** click **Add** under the corresponding section of the panel and repeat the above steps.

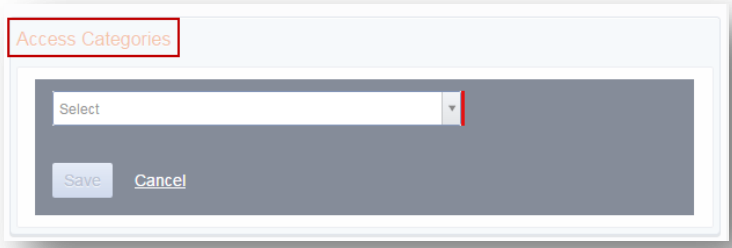
Treatment Domains: If enabled in your instance complete the Treatment Domains panel.

a. To begin, under the **Additional items section** click the **Add Treatment Domain.**
b. The **Treatment Domain** panel opens.

c. Select the correct domain.
d. Click **Save.**
e. If additional **Treatment Domains** need to be added click **Add** under the corresponding section of the panel and repeat the above steps.

Access Category: If enabled in your instance complete the Access Category panel.

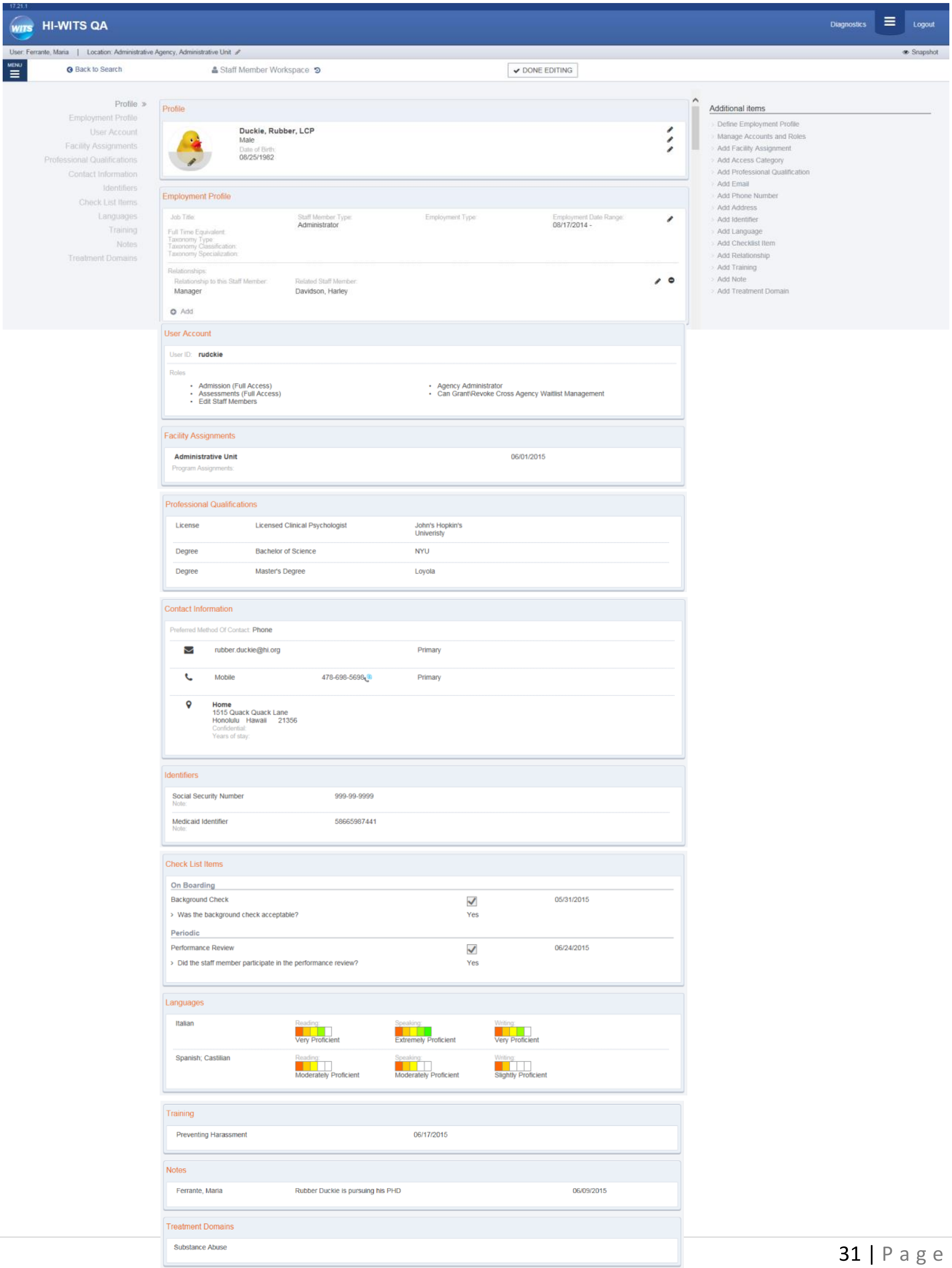
a. To begin, under the **Additional Items section** click the **Add Access Categories.**
b. The **Access Category** pannel below appears.



c. Select the correct **Access Category**.
d. Click **Save.**
e. If additional **Access Categories** need to be added click **Add** under the corresponding section of the panel and repeat the above steps.

Completed Staff Member Profile

If all fields both required and optional are completed your Staff Member Profile will appear as below.

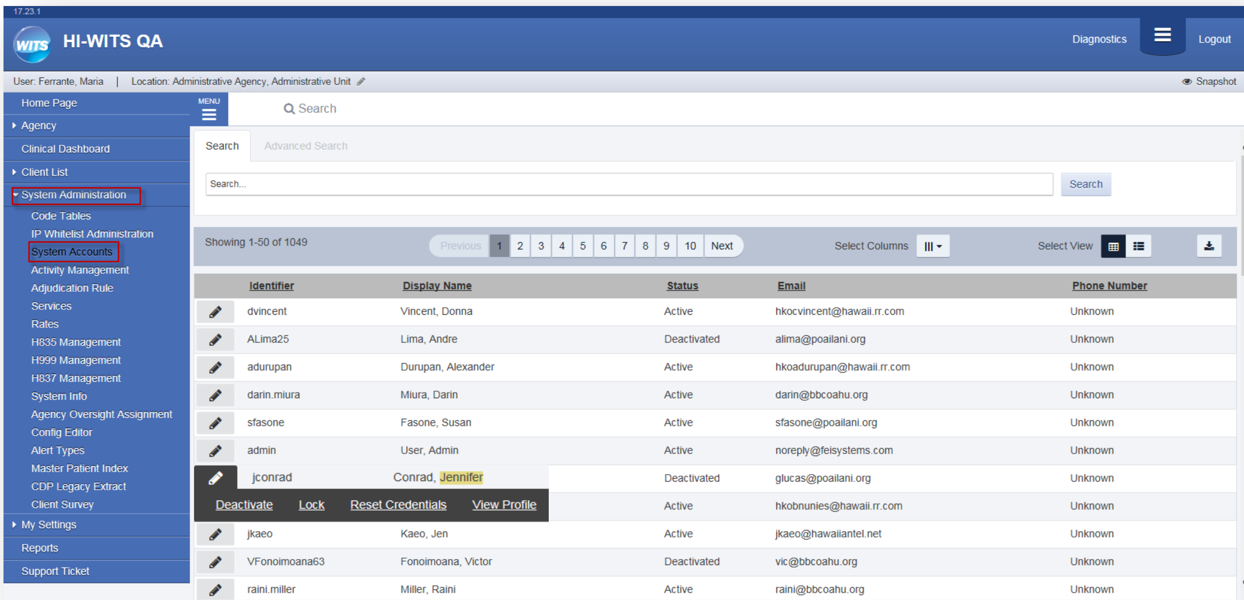


System Accounts

Accessing a System Account

To access a Staff Member's System Account:

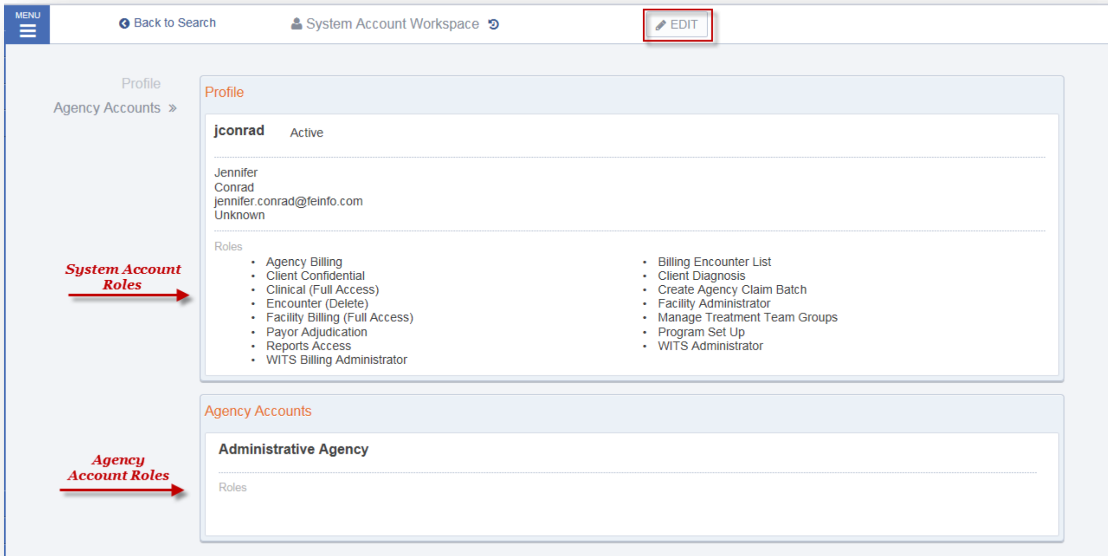
1. From the home page click **System Administration**
2. Then click **System Accounts**
3. You are now taken to the **System Account Search Screen**



4. This screen allow the user to:
    a. Search for a staff member across all agencies
    b. Disable a Staff Member's Account
    c. Lock a Staff Member's Account
    d. Reset a Staff Member's Credentials
    e. View a Staff Member's Profile
    f. Download a list of all System Accounts in excel
    g. View the Staff Member's Identifier which is the WITS username

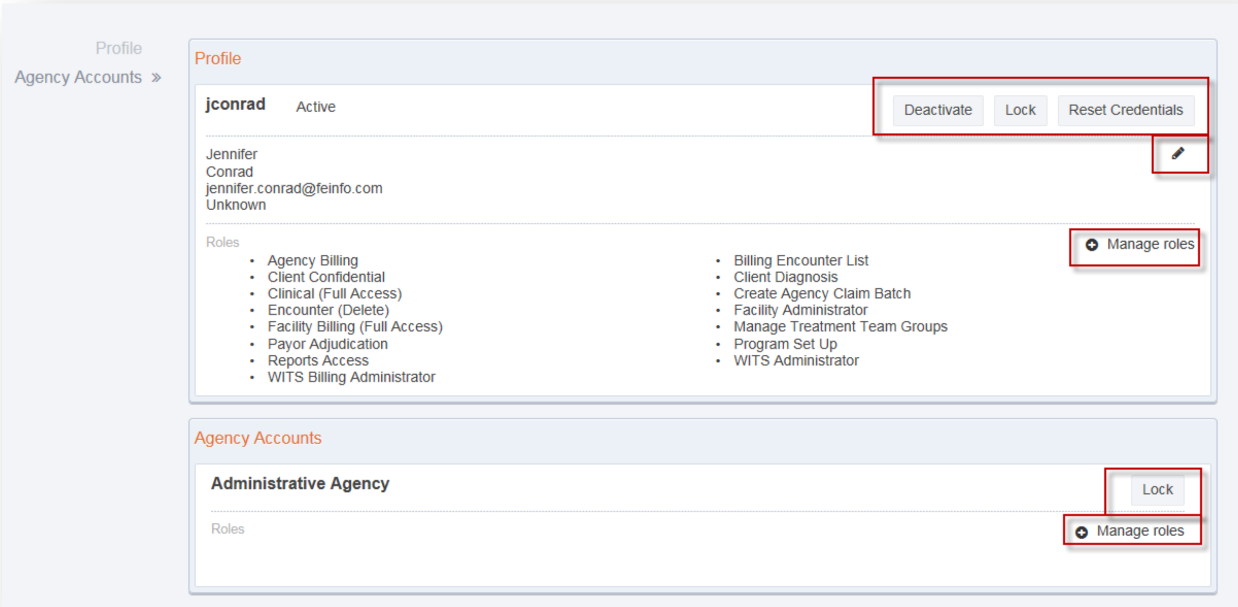
5. After choosing the Staff Member, hover over the **Staff Member's Account** and click **View Profile**
6. This opens the **Staff Member's System Account** below.

Note: A System Account represents the Staff Member's login to the system. In the past a Staff Member's record had a login ID, now a Staff Member's System Account has an identifier which is the Staff Member's username. Previously in prime the Staff Member's login ID was on the account information page of the staff profile.

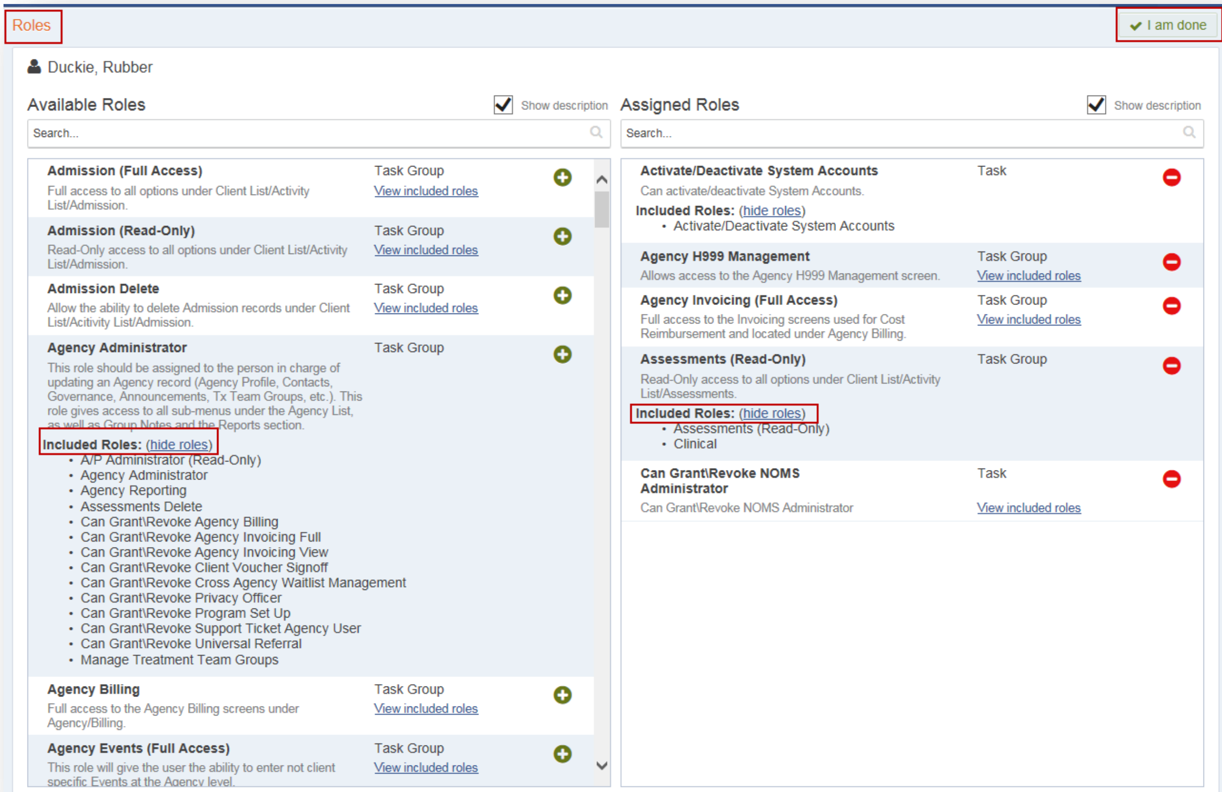


a. The screen shot above shows WITS Administrator's System Account. Most WITS Administrators or System Administrators will not have any roles under their Agency Account. It is okay if they do, but is not necessary.
b. Notice that this user's System Account above only has roles at the System Account level on the Profile panel. Those roles determine her access at a System Account level.
    i. When this user enters any Agency, she maintains those System roles.
    ii. If she also had roles assigned at the agency level, she would inherit those permissions while in the context of that agency.
c. A Staff Member such as a counselor would only have roles in the Agency Accounts panel. These roles would be given to Staff Members when you are creating their Staff Member Profile. The Agency Account Roles can be managed through the Staff Member's Staff Profile in the Agency and in the System Administration panel above as they will automatically update each other.
d. All users will still have a single System Account, single Agency Account and single Staff Member record.

7. To make any changes to the users **System Account** click **EDIT** at the top of the screen.
8. Administrative actions such as Manage Roles will appear at the right hand of the panels



9. To add roles either to the **Staff Member's System Account** or to the **Agency Account** click on **Manage Roles** under the corresponding panel.



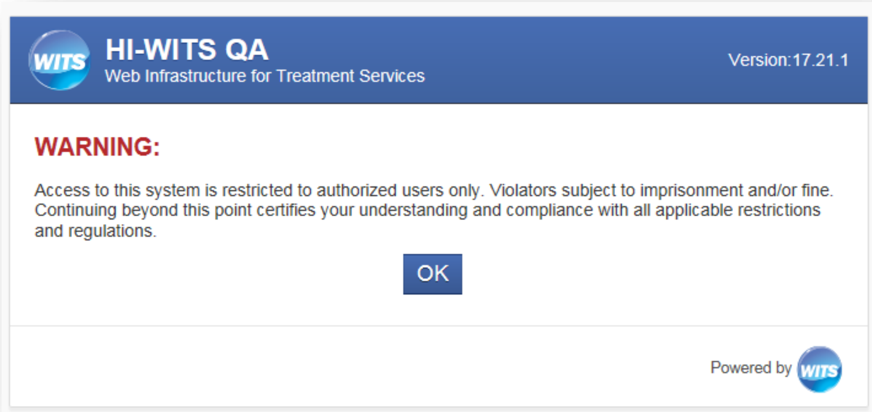
10. The **Roles** screen below appears.
    a. Users can:
        i. Search for available roles by typing in the available roles search box which will filter the results as the user types
        ii. View included roles in each role
        iii. View the role description
    b. To select a role click on the associated **plus sign**. This will automatically move the selected role from the **Available Roles** to the **Assigned Roles** box.
    c. To delete a role chosen by mistake, click the associated **minus sign**. This will automatically move the selected role from the **Assigned Roles** to the **Available Roles** box.
11. When all roles have been assigned for this user click **I am done**. All chosen roles are now shown under the corresponding panel and the user is taken back to the Staff Member's System Accounts page.

Tip: To view the last time a Staff Member logged in, view their profile in the system account and click on the history button next to System Account Workspace. A list of all business operations performed on that system account are shown such as Activating and Deactivating an Account, End System Session, Grant System Role, Lock account, Revise Contact Information, Revised Session Expiration, Revoke System Role, Start System Session and Unlock.

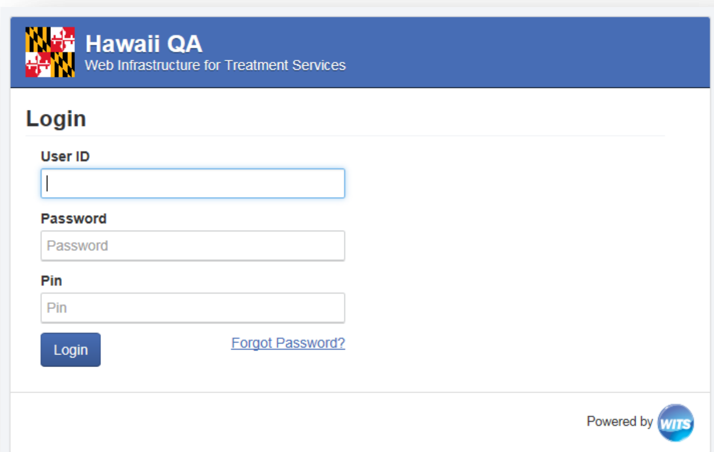
Logging into WITS

The process of logging into WITS has changed as now the User ID, Password and Pin are all on the same page.

1. To login, open your browser then enter the **URL** of your **WITS** system.

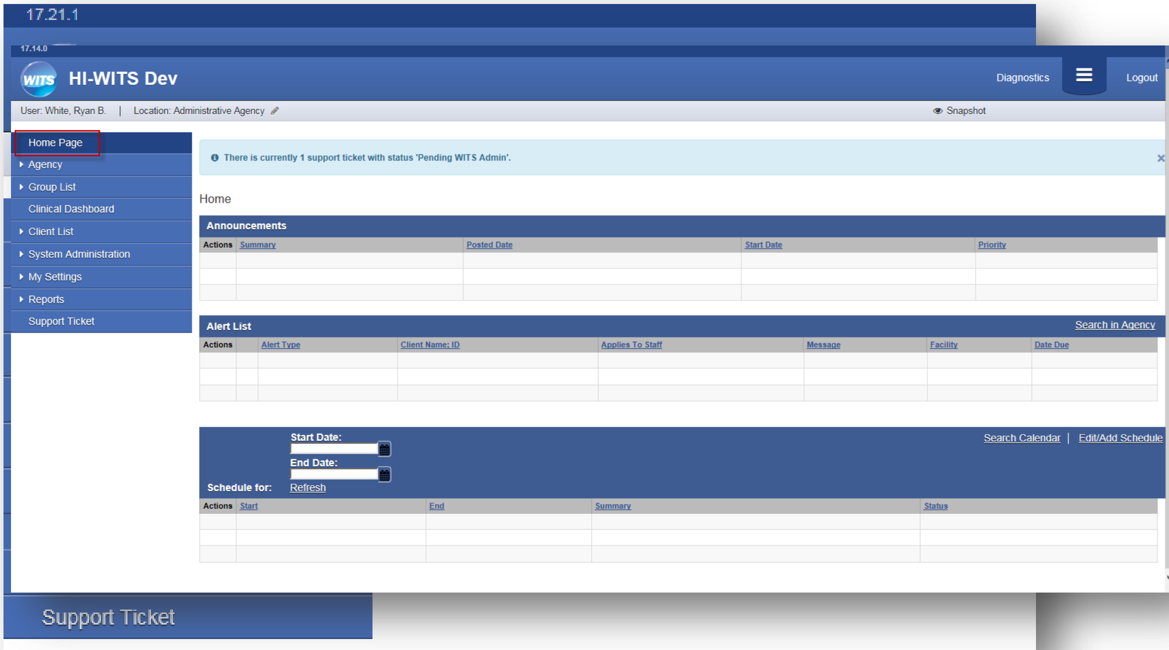


2. Type in your **User ID**, **Password** and **PIN** then click **Login**.



Tip: Any user who has not previously answered their security question will be prompted to answer it as soon as they log into 18.0 for the first time.

3. If asked, choose your Agency and Facility and click **Go**.

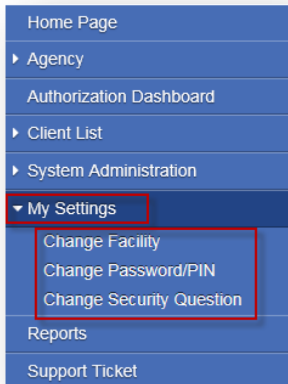


4. You will then be taken to your homepage.

System Settings

In order to allow more intuitive access in EA the **My Settings** menu item on the left hand navigation menu is being removed. The functionality will now be accessible in other places in the WITS system.

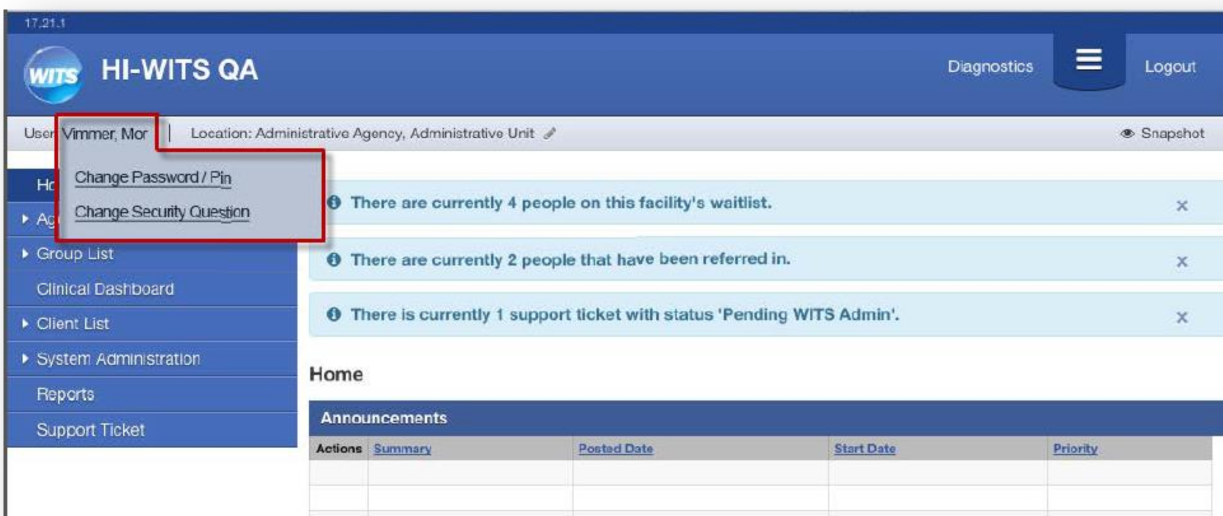
Currently the **My Settings** menu items allows the user to **Change Facilities, to Change Password/Pin**



and to Change Security Question.

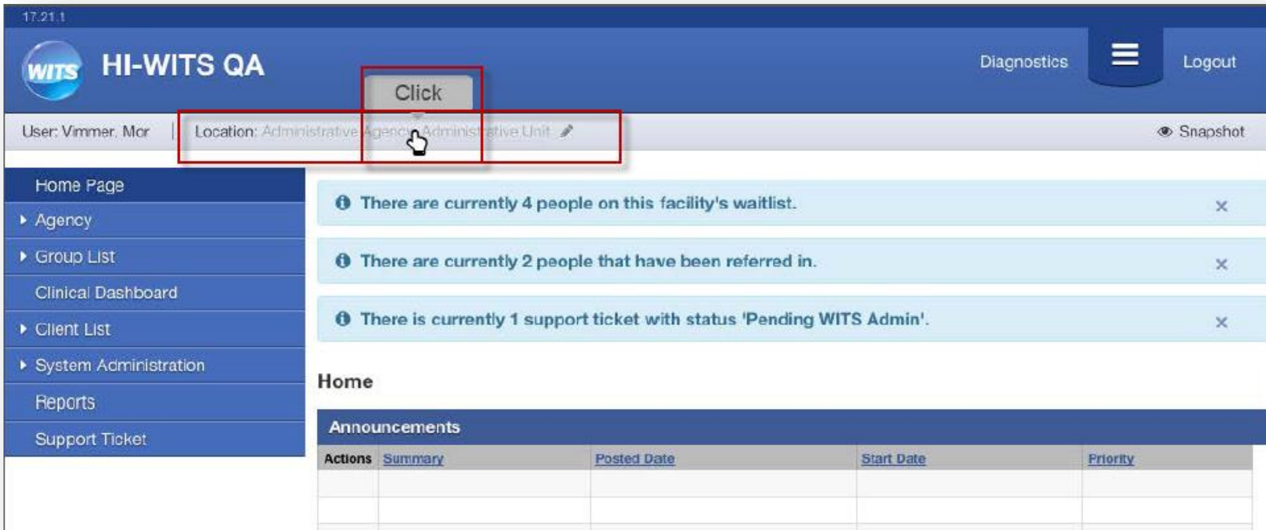
Password/Pin and Security Question

Users can now **Change Password/Pin and Change Security Question** by hovering over the user's Name which is displayed in the top left hand corner of the screen.

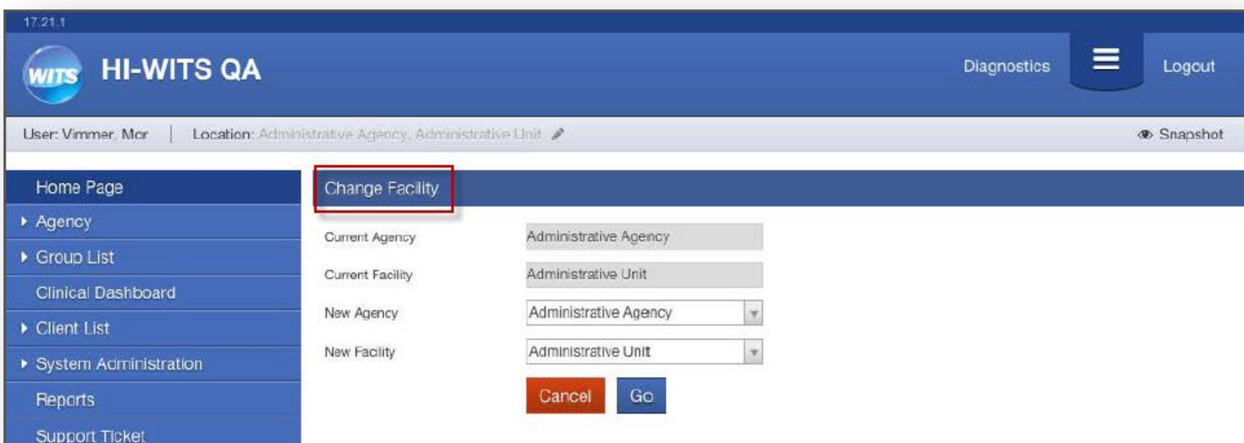


Changing Facilities

If users have access to more than once agency, facility or both they will be able to change facilities by clicking the **Location** in the top left hand corner of the screen.



Once the user clicks on **Location** they can now change their **Agency, Facility or both**.



Logging Out of WITS

The process of logging out of WITS has not changed.

1. To log out of WITS click the log out button in the top right hand corner of your screen.
2. The Logout screen will appear.
3. Click Yes to log out.